



TALENT^{LINK} REFERENCE CHECK TOOL

QUESTIONNAIRES

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Purpose

Professional references are an integral part of assessing candidates, as they allow managers to validate a candidate's experience and gain insight into their past performance, skill set, and cultural add. Additionally, recent amendments to the New York City Fair Chance Act (FCA) require employers to conduct professional references before extending an offer of employment.

TalentLink Reference Check Module

The TalentLink Reference Check Tool is enabled through the recruitment process. We have created forms with specific questions for various roles that you can deploy to a candidate's references concurrent with other steps of the recruitment process.

While this is an optional tool, it is highly recommended, as we are required to have completed reference checks for all finalists.

Questionnaires

Rating Scale

Surveys include mostly closed-ended questions, will take 5-7 minutes to complete, and are broad enough to cover a variety of popular roles across Columbia University.

1-Never | 2- Very Infrequently | 3-Infruquently | 4- Somewhat Frequently |
5- Frequently | 6-Very Frequently | 7-Always | N/O – Not observed

Shared Questions

The following questions will appear on all reference check forms.

1. What is your relationship with the applicant? [radio button]
 - Current Supervisor
 - Former Supervisor
 - Peer
 - Current Subordinate
 - Former Subordinate
 - Personal
2. For how long did you work with the candidate? [radio button]
 - Less than a year
 - One to three years
 - Three to five years
 - More than five
 - N/A (personal relationship)
3. Given the opportunity, would you rehire or work again with the candidate? [radio button]

- Yes
- No
- Not applicable

4. Please share the candidate's areas of growth/improvement [Open-Ended Question]
5. Please share the candidate's strengths [Open-Ended Question]

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

6. Trustworthiness, honesty, high standards, ethics, and confidentiality
7. Timeliness and dependability, and time management
8. Attention to detail, organizational skills, and systematic approach to work
9. Ability to learn and use technology (e.g., student databases, MS Office, other systems)
10. Good listening skills, listen without interruption, ask appropriate questions
11. Build positive working relationships
12. Problem-solving skills, ability to make high-quality decisions using sound reasoning and judgment
13. Clear and effective verbal and written communication skills
14. Accountability, the ability to accept feedback without becoming angry or defensive and uses it to strengthen future performance
15. Treat individuals of different backgrounds, beliefs, and gender with fairness, respect, and sensitivity
16. Consistently meet or exceed goals and expectations
17. Diplomacy in dealing with others and effectively resolving conflicts

Academic Advisor

Related roles: Student Affairs, Educational Administration, Academic Affairs, Career Services

To what extent does the candidate demonstrate the following effectively (Rate 1-7, or N/O):

1. Maintain accurate and up-to-date student information meeting process and policies
 2. Work well cross-functionally to ensure optimal student experience (e.g., student services, career services, admissions)
 3. Engage with students throughout the year to ensure that they meet requirements and are aware of learning opportunities across the university
 4. Carefully monitor student progress, offering positive guidance for improvement when academic or adjustment problems arise
 5. Provide crisis intervention to students when difficult situations occur
 6. Successfully use internal resources to effectively assist students (e.g., tutoring, financial aid, mental health services) after evaluating their individual need
 7. Successfully uses data to identify trends and offers ideas that help elevate the students' experience
 8. Successfully plan and deliver student events and other student professional development programs
- + shared questions

Administrative Dean

Relevant Roles: Heads of Administration, Senior Administrators

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Strategic mindset (e.g., examine the accuracy of underlying assumptions, identify core issues, anticipate obstacles, gather and analyze trends)
 2. Ability to act as a catalyst, communicate the need for change, and inspire action
 3. Serve as a trusted advisor to the senior administrators
 4. Build strong and diverse teams by continually recruiting and selecting competent and talented people
 5. Effectively assess the performance of others and hold them accountable for meeting their goals
 6. Delivers timely and honest feedback to others in a constructive and empathetic manner
 7. Strong operational acumen
 8. Ability to develop realistic budgets, keeping in mind current needs and future growth
 9. Actively participate in institutional and faculty committees
 10. Stay current with relevant trends and legislation affecting educational institutions
 11. Develop partnerships with the business community and with other educational institutions
 12. Evaluates key metrics to recommend changes to programs and facilities (e.g., admissions, enrollment statistics, external funding, etc.)
- + shared questions

Administrative Professionals

Relevant Roles: General Administration

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Uses calendar and other scheduling platforms proficiently.
 2. Displays proficiency with relevant software platforms (MS Office, Google Suite, etc.)
 3. Independently manage own time and show good judgment in prioritizing work to meet deadlines
 4. Plan, execute, and manage work and projects in a disciplined and organized way
 5. Manage office procedures (e.g., procurement, expense reports, filing, etc.)
- + shared questions

Communications Roles

Relevant Roles: Communications Manager, Communications Director

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Appropriately delegate tasks to direct reports according to skill level or area of expertise
2. Demonstrate Social Media Content Management expertise
3. Possess excellent knowledge of communications strategies and principles
4. Plan, execute, and effectively manage projects
5. Stay current with tools, technology, and best practices in communications

6. Deliver effective presentations, speeches, and other official communications on behalf of the organization
 7. Gather information trends, events, and influencers relevant to communications strategies
 8. Effectively analyze marketing data to track the effectiveness of the communications strategy
 9. Effectively manage market research and its synthesis into action plans
 10. Display proficiency with appropriate software applications (e.g., analytics, CRM)
 11. Develop realistic estimates for the department's resources, timelines, and budget
 12. Create and disseminate original marketing content across a wide variety of platforms
 13. Stay current with marketing and communications goals, messaging strategies, and branding campaigns to remain aligned with the vision of the organization
- + shared questions

Executive Assistant

Relevant Roles: Executive Assistant, Administrative Coordinator, Assistant

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Effectively coordinate logistics, accurately schedule appointments and travel plans, and coordinate complex executive meetings
 2. Stay up-to-date with any changes to the schedule and updates executives or managers as necessary
 3. Accurately gather and disseminate materials required for meetings or presentations
 4. Accurately conduct research and prepare reports for executives or managers, as requested
 5. Serve as a gatekeeper and anticipate the needs of the executive(s) they support
 6. Communicate information, ideas, and data clearly and concisely so that others can understand
 7. Prioritize and respond to incoming correspondence, phone calls, and e-mails in a courteous and helpful manner
 8. Plan, execute, and manage events to ensure that they take place on time and within budget
- + shared questions

Event Management

Relevant Roles: Event Coordinators, Event Managers

To what extent does the candidate demonstrate the ability to (Rate 1-7, or N/O):

1. Maintain clear and accurate guest lists and other information relevant to events
2. Plan, execute, and manage events to ensure that they take place on time and within budget
3. Effectively coordinate event logistics, including seating charts, accessibility, and security, as applicable
4. Manage event attendance, overseeing the sending out of invitations and distribution of promotional materials
5. Communicate information, timelines, and directions clearly and concisely so that clients, vendors, and relevant others can understand

6. Coordinate effectively with others to plan events that meet or exceed client or company expectations (e.g., caterers, musicians, decorators)
 7. Negotiate reasonable contracts with third-party vendors to minimize costs and stay within budget
- + shared questions

Financial Professionals

Relevant Roles: Finance and Accounting

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

Senior Financial Professionals

1. Develop and maintain financial operating procedures (e.g., payroll, invoicing, and payment systems)
2. Implement the most appropriate technology (e.g., financial applications, tax software) to maximize efficiency
3. Gather information from relevant sources (e.g., accountants, financial analysts, auditors) to understand and resolve questions or issues
4. Authorize requests for disbursements in alignment with the policies of the organization
5. Stay current and ensure compliance with all industry, legal, tax codes, and government policies and regulations
6. Monitor the organization's financial records and budgets to project cash flow, revenue, and expenses accurately
7. Advance knowledge of MS Excel and other budgeting and forecasting tools
8. Manage other finance professionals; delegate tasks according to skill level or area of expertise

+shared questions

Junior Financial Professionals

1. Maintain financial operating procedures (e.g., payroll, invoicing, and payment systems)
2. Create and implement process improvements
3. Gather information from relevant sources to understand and resolve questions or issues (e.g., accountants, financial analysts, auditors)
4. Maintain up-to-date knowledge of federal and state codes, regulations, and laws relevant to the area of finance
5. Ensure compliance with all industry, legal, and government policies and regulations
6. Create and maintain accounting journals, ledgers, and other records detailing financial business transactions (e.g., accounts payable, disbursements, expense vouchers, receipts)
7. Collaborate with vendors, coworkers, and relevant others in a professional, courteous, and timely manner

+shared questions

Fundraising

Relevant Roles: Development, Major Gifts, Alumni Relations

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Strong track record in meeting and exceeding fundraising goals set by the organization
 2. Project a positive image of the organization and its mission in all interactions
 3. Analyze and track event budgets and fundraising targets vs. actual budgets
 4. Network and initiate relationships with members of the community, including volunteers and prospective sponsors
 5. Motivate, develop, and direct volunteers as they work
 6. Recognize and praise the efforts and accomplishments of volunteers
 7. Reach out to appropriate sources to get the resources and information needed to be successful
 8. Assign appropriate tasks or projects to volunteers based on their skills, availability, and interests
 9. Accurately qualify prospective organizations for sponsorship or donations
 10. Determine how the event budget will be spent, stay within budget, and account for expenditures
 11. Analyze information and evaluate results to choose the best resolution
 12. Inspire others to act by demonstrating a commitment to the organization's mission
 13. Plan, execute, and effectively manages fundraising activities, goals, and objectives
 14. Effectively manage a portfolio of prospects through the qualification, solicitation, and stewardship processes
 15. Network with members of the community, including alumni and prospective donors
 16. Maintain a professional demeanor at all times, especially when interacting with donors and prospects
- + shared questions

Grant Management Roles

Relevant Roles: Grant Coordinator, Grant Manager, Grant

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Develop plans that include budget, staffing, and timelines for all sponsored projects
 2. Track all deadlines and requirements throughout the grant application process
 3. Ensure timely submission of new grants, reports, and renewal applications
 4. Convey information, e.g., plans, budget, timelines, and deliverables, clearly and concisely
 5. Serve as a resource to others on questions related to the submission process
 6. Conduct research to identify appropriate funding opportunities
 7. Gathers information from relevant sources to assist others in completing grant applications and reports
 8. Prioritize resource allocation based upon program plans, timelines, and complexity
 9. Maintain privacy and confidentiality of all institutional and other sensitive information
- + shared questions

General Officer of Administration: Open-ended questions

Relevant Roles: This is a general form with open-ended questions. It can be used for any role. However, this may take longer to complete, as all questions are open-ended.

Open-Ended Questions

1. When you think of the candidate, how would you characterize them overall?
2. What was their impact on the success of your organization?
3. How did teammates and colleagues like working with the candidate?
4. How does the candidate do with deliverables? Are they done on time and ready to use by the next person?
5. Please describe the candidate's leadership skills.
6. Please describe their strategic capability. Please provide an example of a program they implemented that directly impacted the business?
7. What was the candidate's record of performance accomplishment in their role? What were they able to accomplish?
8. How does the candidate build relationships? How would you describe their ability to manage up, down, and across the organization?
9. How do they demonstrate initiative?
10. How would you describe their attitude to change?
11. Describe the candidate's organizational skills (ability to prioritize and manage time).
12. How would you describe their style in managing staff? How do they give feedback?
13. How does the candidate react under pressure?
14. What is the best way to manage the candidate to get the best ROI?
15. What counsel would you give the senior leadership of the hiring organization to create a meaningful environment for the candidate to flourish and contribute at their maximum capacity?
+ shared questions

HR Professionals

Relevant Roles: HR Coordinators, HR Managers, HR Directors, Recruiters

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Display proficiency using HR tools and applications (e.g., HRIS, ATS, etc.)
2. Excellent knowledge and stay current with new developments in relevant HR practices and technology
3. Serve as an advocate or sponsor to employees
4. Collect relevant data and makes accurate interpretations of the results
5. Make high-quality decisions based upon facts and the HR needs of the organization
6. Act as a strategic business partner to managers/leaders across the organization
7. Maintain confidentiality and privacy of employee and company information
8. Possess a thorough knowledge of human resource policies, procedures, and regulations
9. Deliver timely and honest feedback in a constructive and non-threatening way

10. Effectively present issues and solutions, both formally and informally, to employees at all levels
11. Effectively conduct candidate assessments (e.g., phone screening, interviews, performance appraisals, etc.)
+ shared questions

IT Professionals

Relevant Roles: IT Support, Helpdesk

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Display excellent knowledge of information technology and its applications
 2. Effectively bridge technical and non-technical communities, so all clearly understand those project goals, timelines, and deliverables
 3. Collaborate with key internal and external stakeholders (management, clients, coworkers, support areas) to achieve common goals
 4. Identify and obtain resources for the department needed to complete projects successfully (e.g., materials, consultants, and vendors)
 5. Possess strong knowledge of computer hardware and software currently in use
 6. Stay current with the latest developments in relevant technology
 7. Gather and evaluate information about end-user requirements to troubleshoot and provide needed support effectively
 8. Quickly resolve end-user issues with printing, e-mail, desktop operations, etc.
 9. Quickly master new or unfamiliar technology or technical concepts
 10. Install and configure computer hardware, software, or peripheral equipment according to specifications
 11. Stay current with the latest developments in relevant technology
- + shared questions

Project Manager

Relevant Roles: Project Management, IT Project Management

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Effectively measure performance and hold team members accountable for meeting goals
2. Identify and obtain resources such as materials, staffing, and vendors needed to complete the project successfully
3. Monitor progress and promptly update timelines, milestones, and other aspects of projects when necessary
4. Work well under pressure, multi-tasking efficiently to deliver projects on time and within budget
5. Develop project plans, including goals, technologies, timelines, budget, and staffing
6. Possess excellent knowledge of standard best practices and processes in project management
7. Proficiency with Agile PM methodologies and use appropriate tools to update project plans

8. Display proficiency with project management software and other design tools
 9. Disseminate information, such as project scope, budget, timelines, and deliverables, clearly and concisely
- + shared questions

Support Staff Roles (Admin)

Relevant Roles: 2110 Administrative Roles

To what extent does the candidate demonstrate the following (Rate 1-7, or N/O):

1. Report consistently and on time for work, class, appointments, and meetings
 2. Use basic technology as a tool for communication (e.g., e-mail, scheduling appointments)
 3. Prepare, execute, and complete work in a disciplined and organized manner
 4. Communicate information, ideas, and data clearly and concisely
 5. Promptly inform supervisor when needing guidance with assigned tasks
- + shared questions